

NATIONAL COMMUTER TRACKER

2017 INDUSTRY STUDY



nielsen
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AN UNCOMMON SENSE
OF THE CONSUMER™

INFORMATION

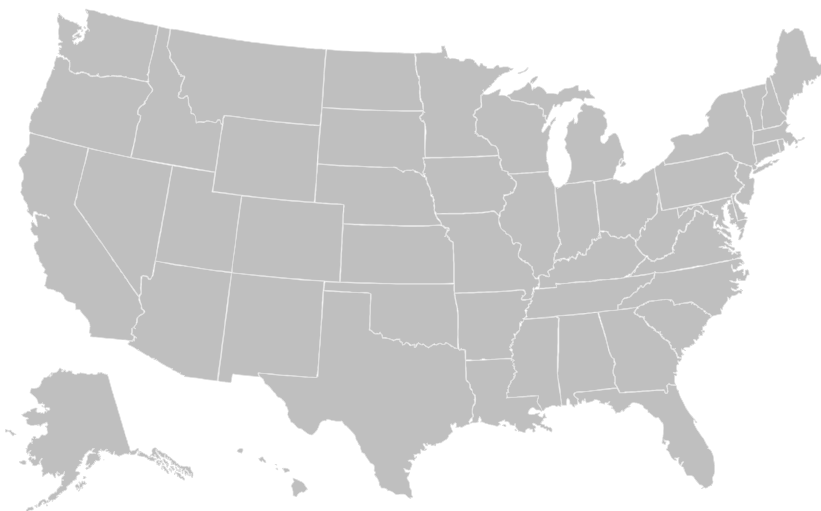
- § **WITHIN THIS REPORT** Nielsen Scarborough offers an in-depth study of the U.S. market's heavy commuters. By understanding the demographics, lifestyles and purchasing behaviors of these commuters, you will be able to map a strategy to effectively target this unique group and further cultivate business.
- § **NIELSEN SCARBOROUGH** is the nation's leader in local market research and provides detailed demographics, lifestyles, product consumption, shopping behaviors and media usage information for the top 77 markets as well as a national study.
- § **THIS REPORT WILL** provide a detailed analysis of the U.S. market as well as the Metro Heavy Commuter. These Commuters are adults 18+ that have traveled 200+ total miles (via car, van, truck, or bus) in past week.

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MARKET INFORMATION

U.S. MARKET

- § PROJECTED MARKET SIZE: 246,843,200
- § HEAVY COMMUTERS PROJECTED SIZE: 75,677,900
- § SURVEY FIELD WORK DATES: 02/15 - 4/16
- § GEOGRAPHY: U.S. MARKET

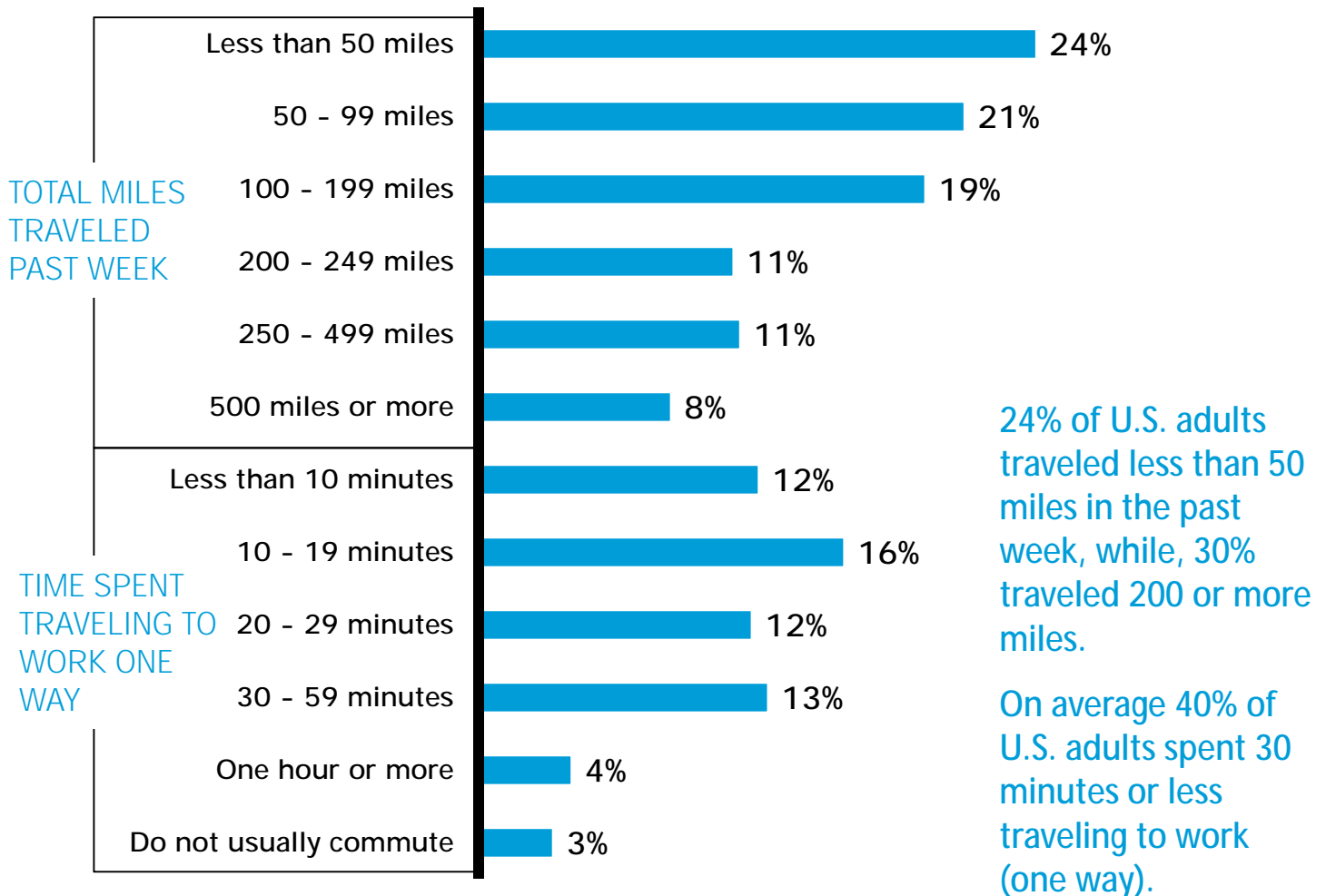


SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016



DURING THE PAST WEEK, MORE THAN 217 MILLION ADULTS IN THE U.S. MARKET HAVE DRIVEN (NOT CARPOOLED) AS A MODE OF TRANSPORTATION.

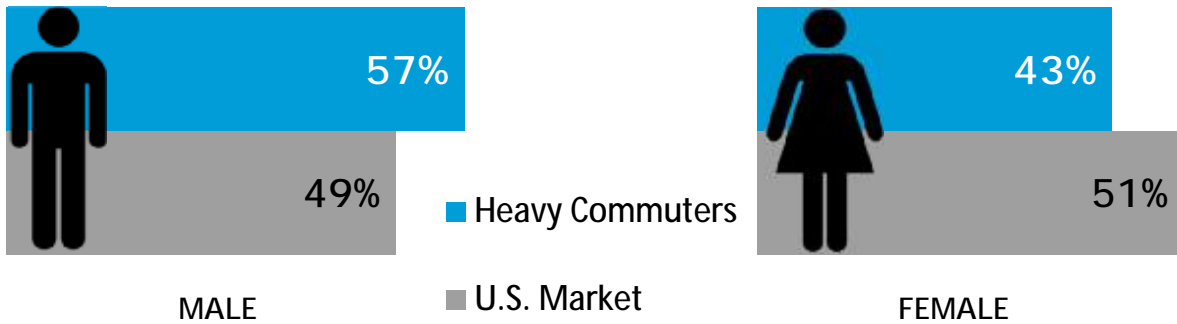
COMMUTING IN THE U.S.



SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

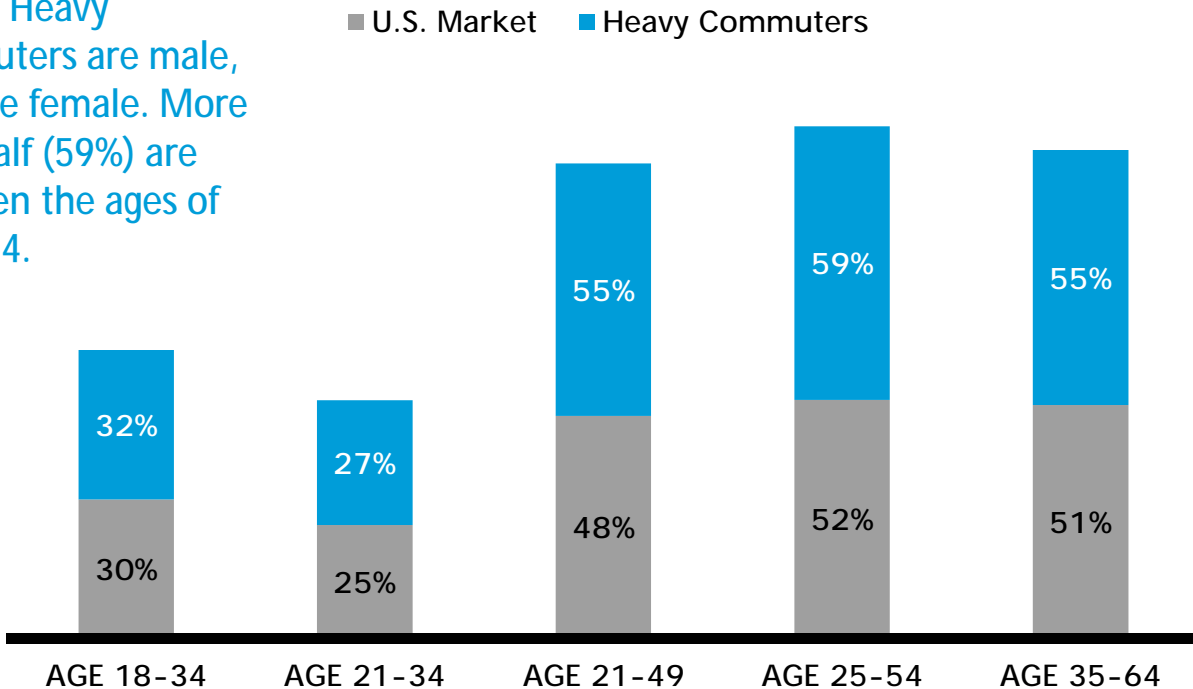
HEAVY COMMUTER DEMOGRAPHICS

GENDER



AGE

57% of Heavy Commuters are male, 43% are female. More than half (59%) are between the ages of 25 to 54.



SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

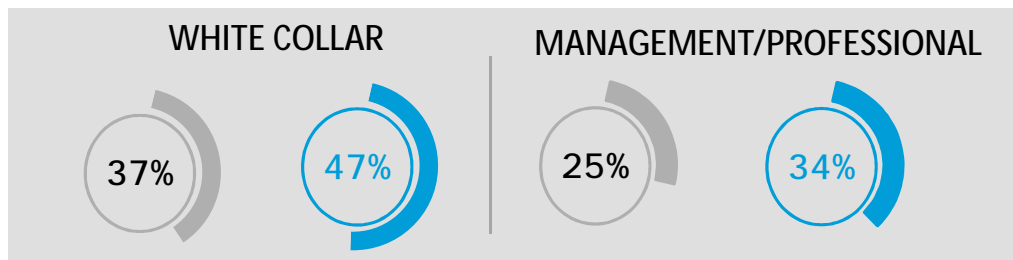
HEAVY COMMUTER DEMOGRAPHICS

EMPLOYMENT

EMPLOYED FULL-TIME

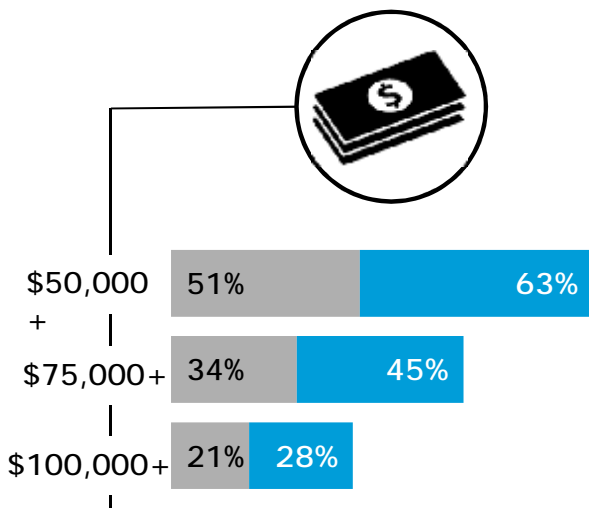


58% of Heavy Commuters are employed Full-Time.



47% are working in White Collar occupations, primarily in Mgt.-Professional roles (34%).

HOUSEHOLD INCOME



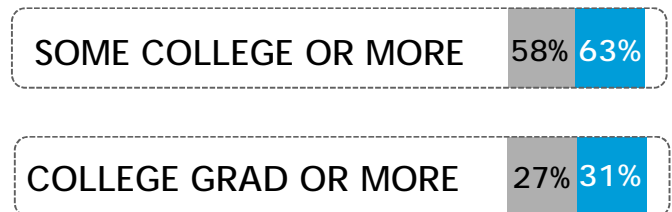
28% of Heavy Commuters have a HHI of \$100K+.

■ U.S. Market ■ Heavy Commuters

EDUCATION STATUS



Heavy Commuters are educated, 31% have a college degree or higher.

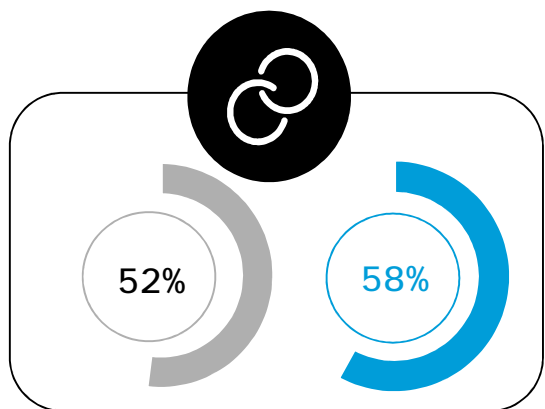


SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

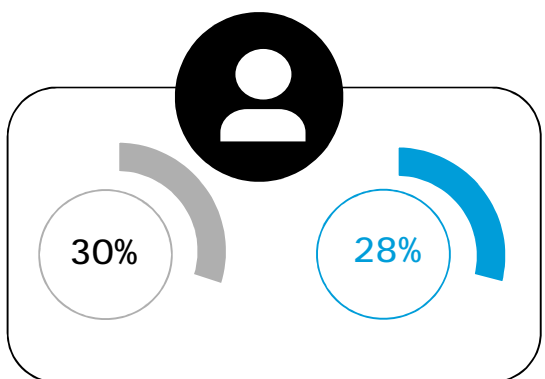
HEAVY COMMUTER DEMOGRAPHICS

MARITAL STATUS

MARRIED

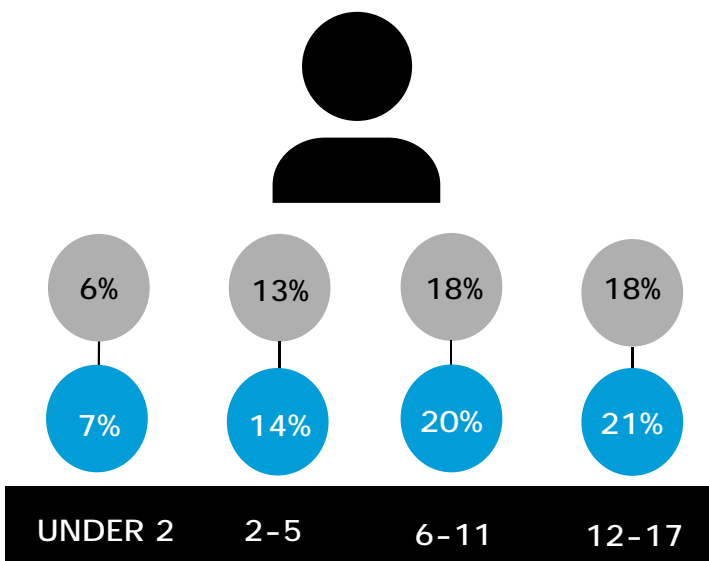
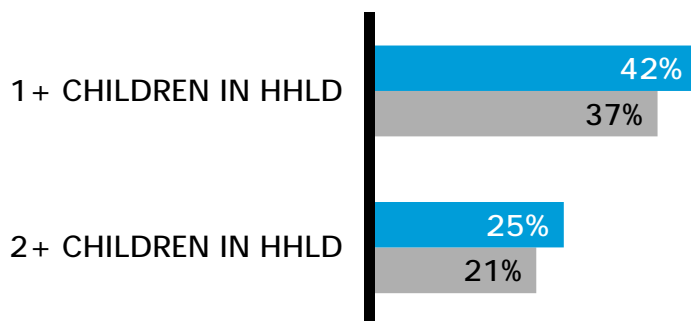


SINGLE/NOT MARRIED



58% of Heavy Commuters are married, while 28% are single/not married.

PRESENCE OF CHILDREN



42% of Heavy Commuters have children in the home. 21% have teens (age 12-17) in the home.

■ U.S. Market

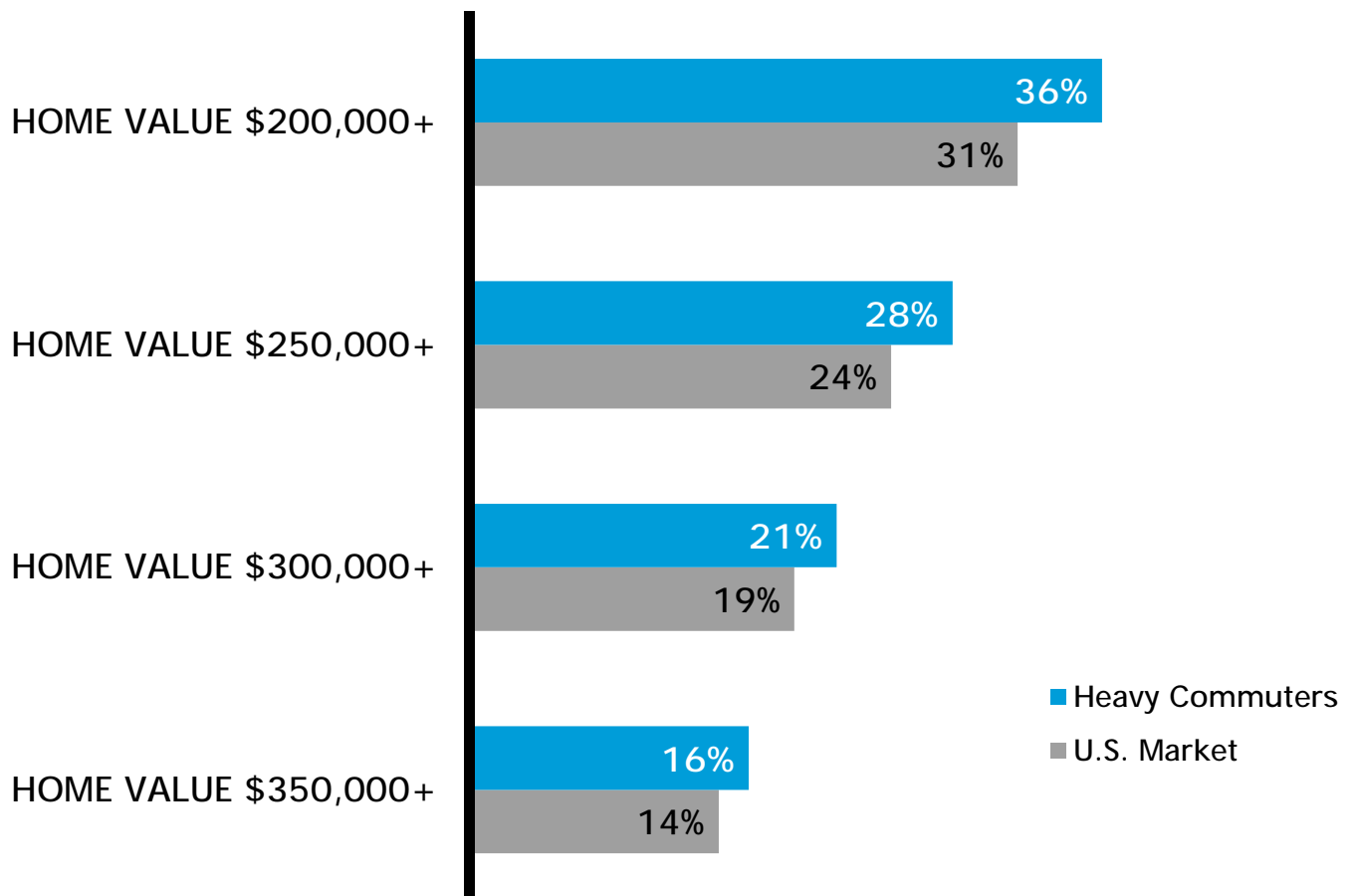
■ Heavy Commuters

SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

HEAVY COMMUTER DEMOGRAPHICS

HOME OWNERSHIP

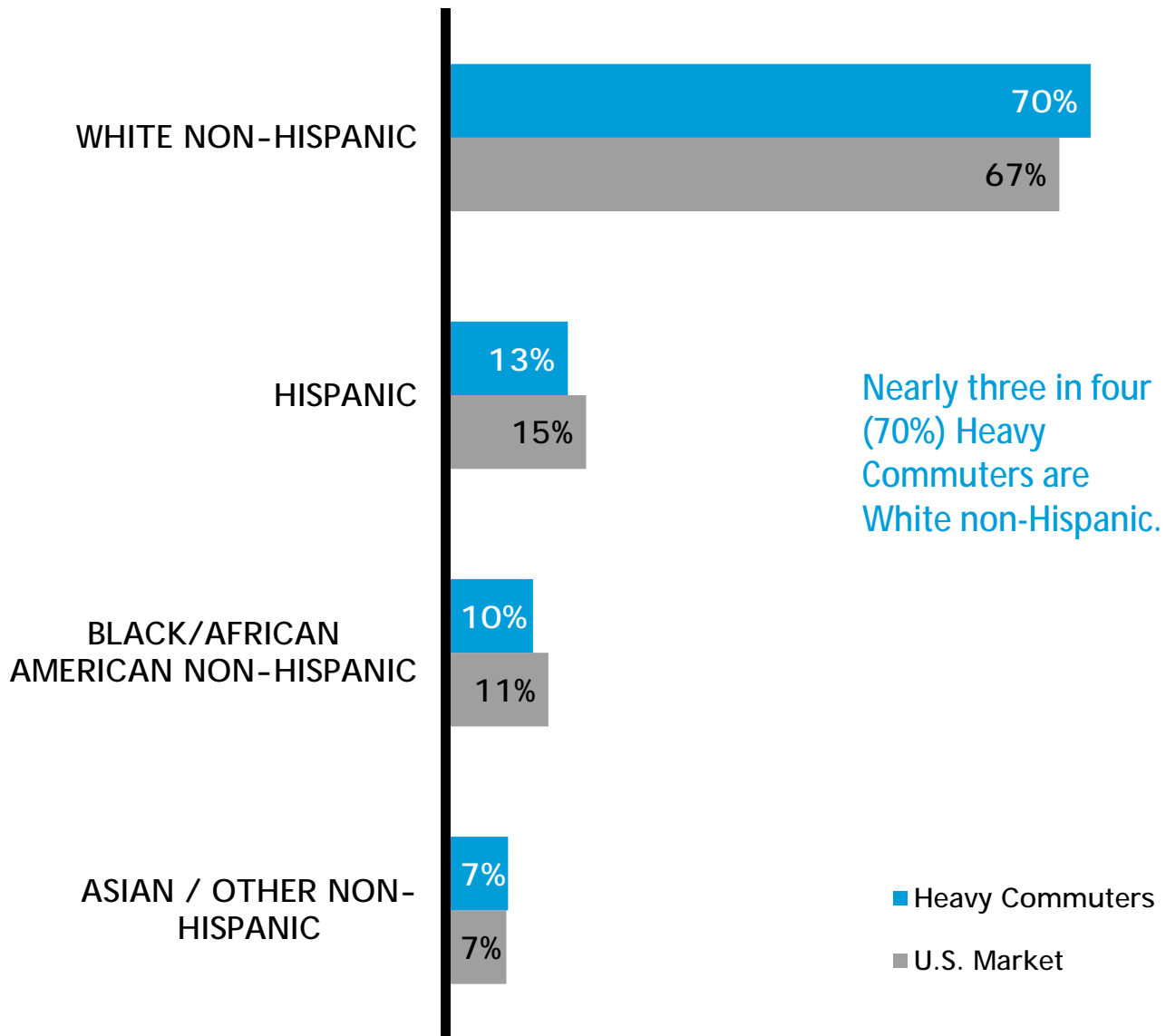
70% of Heavy Commuters are home owners, with 36% owning homes valued at \$200K+.



SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

HEAVY COMMUTER DEMOGRAPHICS

RACE

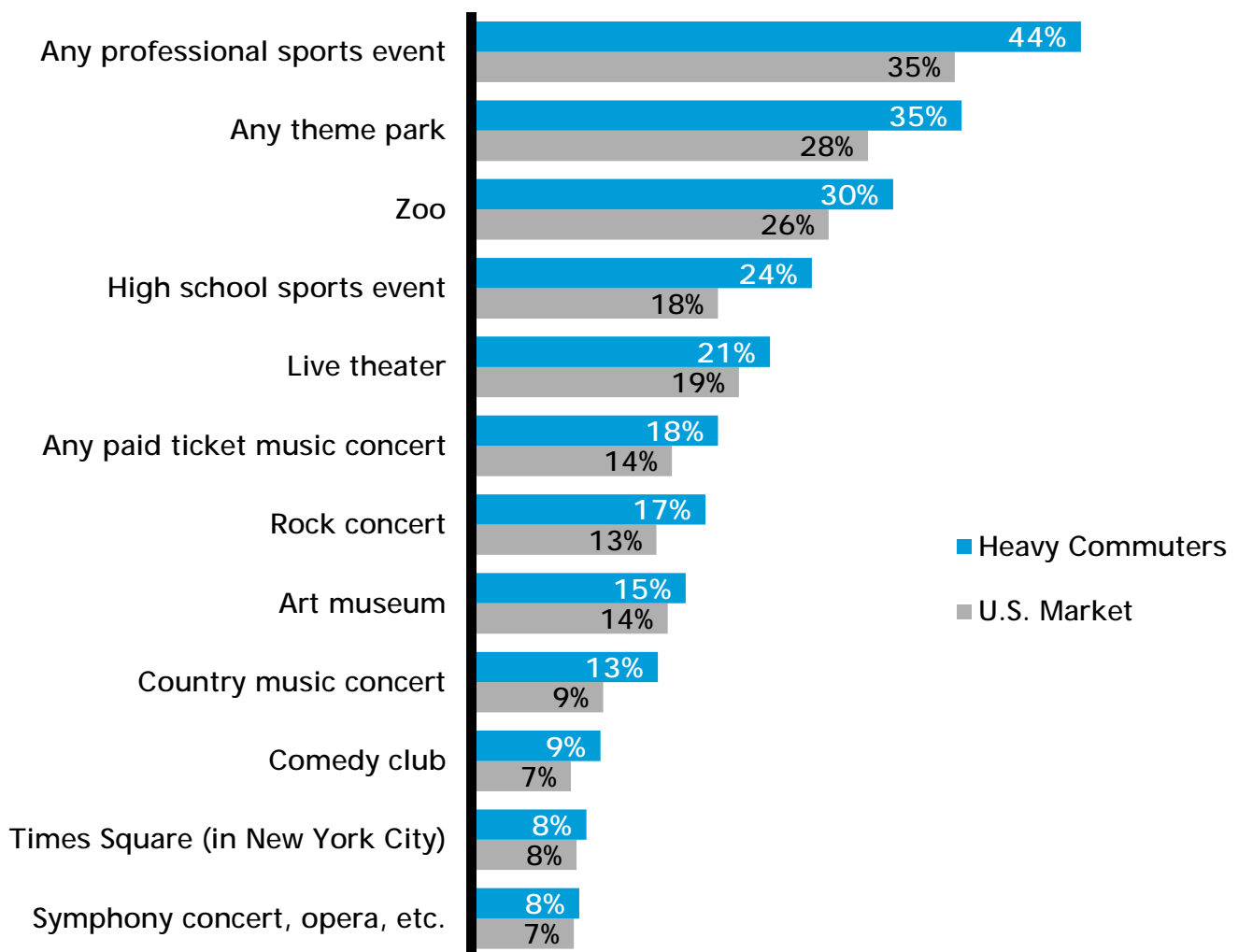


SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016



MORE THAN TWO IN FIVE (44%) HEAVY COMMUTERS HAVE ATTENDED A PROFESSIONAL SPORTS EVENT IN THE PAST YEAR.

HEAVY COMMUTER LIFESTYLES – EVENTS ATTENDED/PLACES VISITED PAST 12 MONTHS

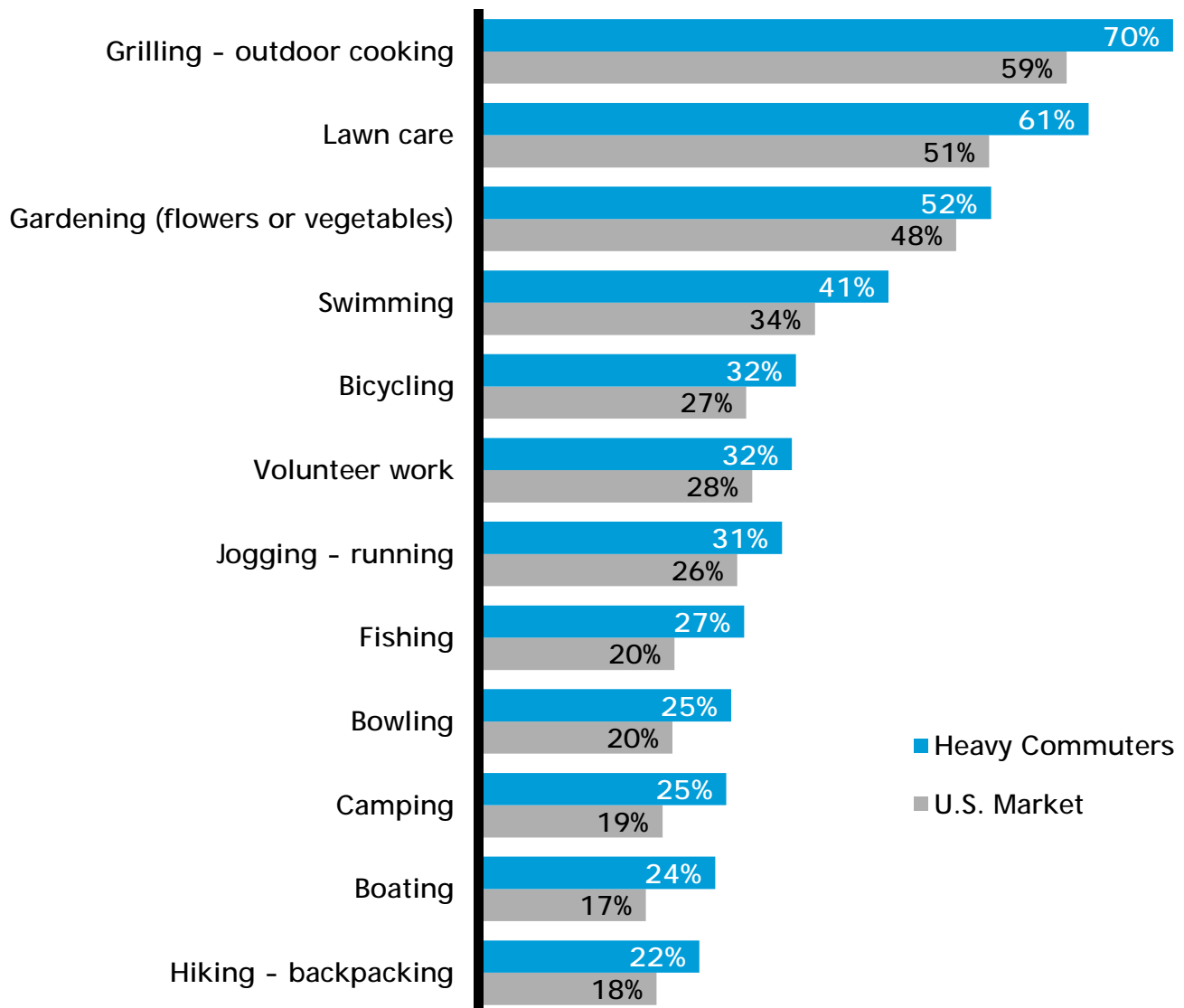


SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016



THE HEAVY COMMUTER ENJOYS A VARIETY OF OUTDOOR AND SPORTING ACTIVITIES, INCLUDING GRILLING, LAWN CARE, BIKING, CAMPING AND BOATING.

HEAVY COMMUTER LIFESTYLES – ACTIVITIES PAST 12 MONTHS

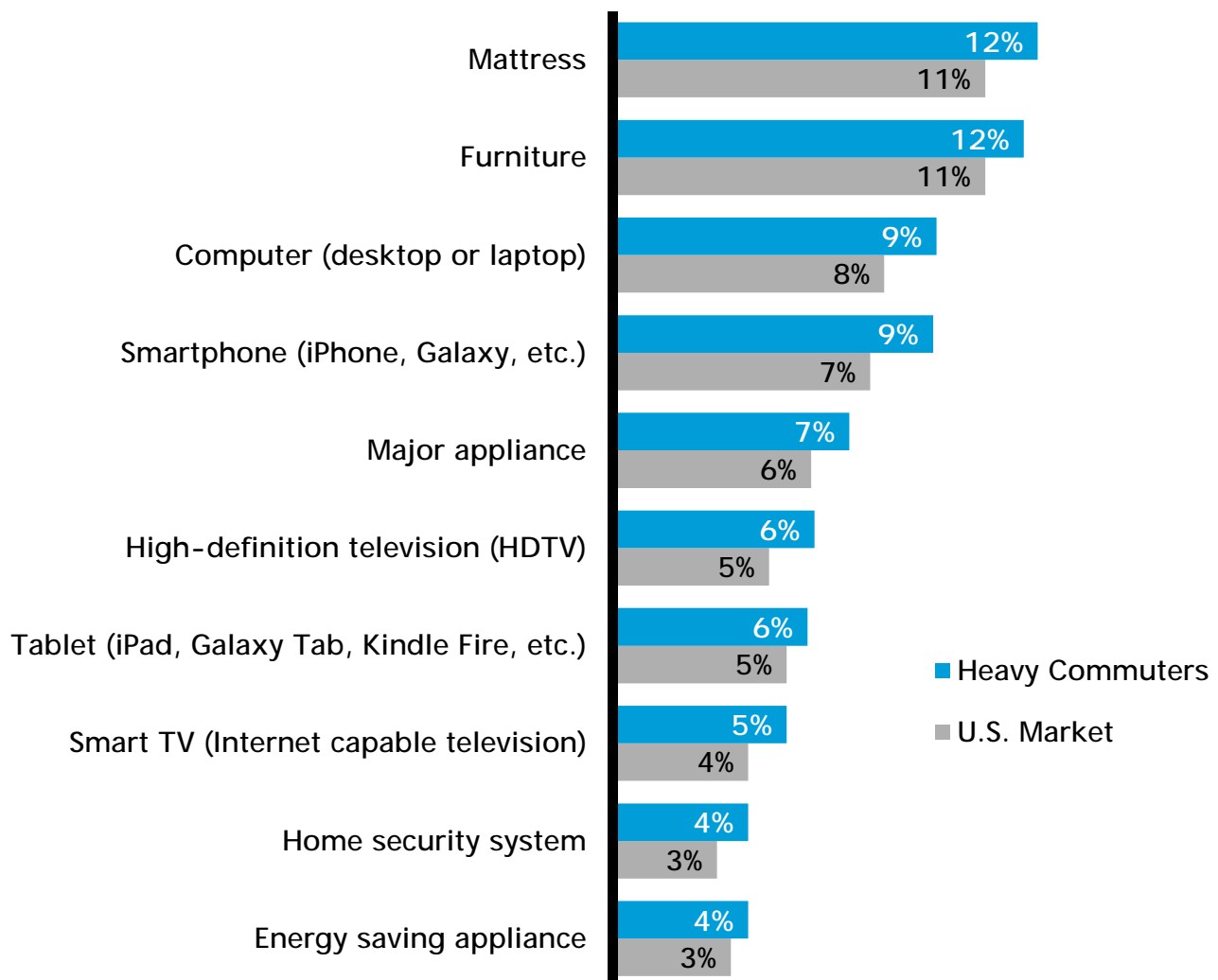


SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016



THE HEAVY COMMUTER IS PLANNING MAJOR PURCHASES IN THE NEXT YEAR, WITH MATTRESSES, FURNITURE AND COMPUTERS AT THE TOP OF THEIR LIST.

HEAVY COMMUTER LIFESTYLES - (HHLD) PLANS TO BUY NEXT 12 MONTHS



SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

National Commuter Tracker

CATEGORIES



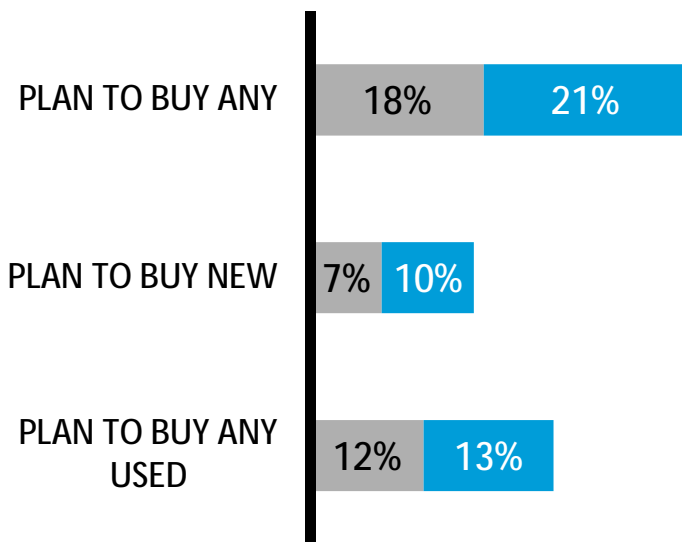


HEAVY COMMUTERS IN THE U.S. PLAN TO SPEND, ON AVERAGE, \$26,800 ON THEIR NEXT NEW VEHICLE, WHICH IS \$2,000 HIGHER THAN THE MARKET AVERAGE.

HEAVY COMMUTERS: AUTOMOTIVE



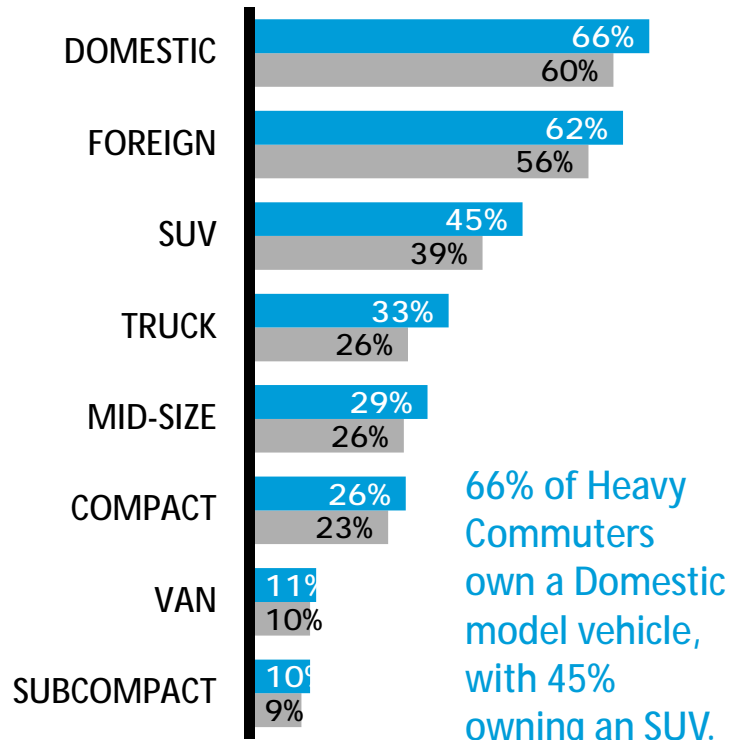
MORE THAN 15.8 MILLION (21%) HEAVY COMMUTERS SAY THEY PLAN TO BUY A VEHICLE IN THE NEXT YEAR



■ U.S. Market

■ Heavy Commuters

MODEL TYPE OWNED



66% of Heavy Commuters own a Domestic model vehicle, with 45% owning an SUV.

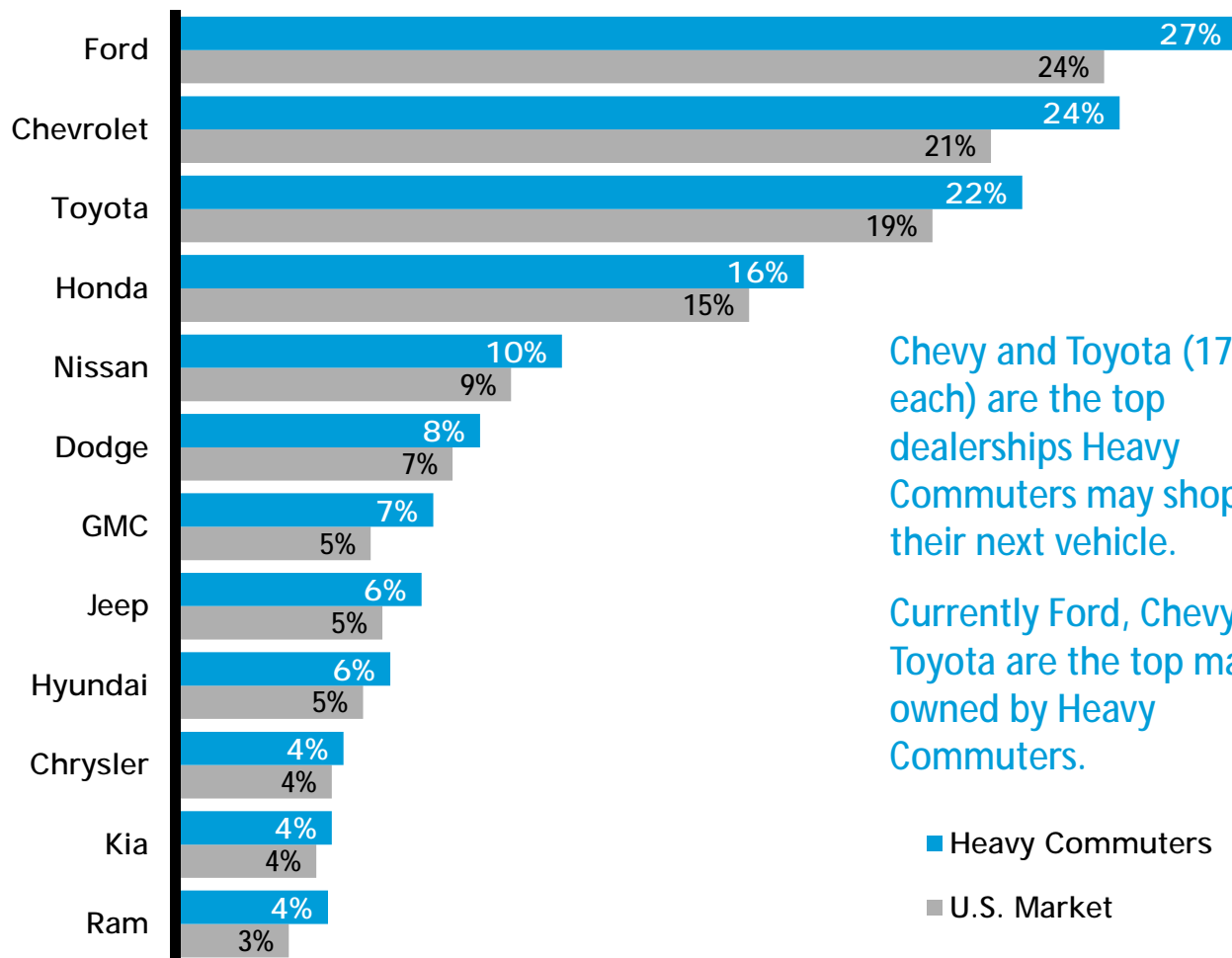
SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

Dealers/Sites Might Shop to Buy Next Vehicle	U.S. MARKET	HEAVY COMMUTERS
Any Chevrolet dealership	14%	17%
Any Toyota dealership	14%	17%
Any Ford dealership	13%	16%
Any Internet site	12%	15%
Any Honda dealership	12%	14%
Any Dodge dealership	7%	9%



HEAVY COMMUTERS: AUTOMOTIVE

MAKE OF VEHICLE OWNED



Chevy and Toyota (17% each) are the top dealerships Heavy Commuters may shop for their next vehicle.

Currently Ford, Chevy and Toyota are the top makes owned by Heavy Commuters.

■ Heavy Commuters

■ U.S. Market

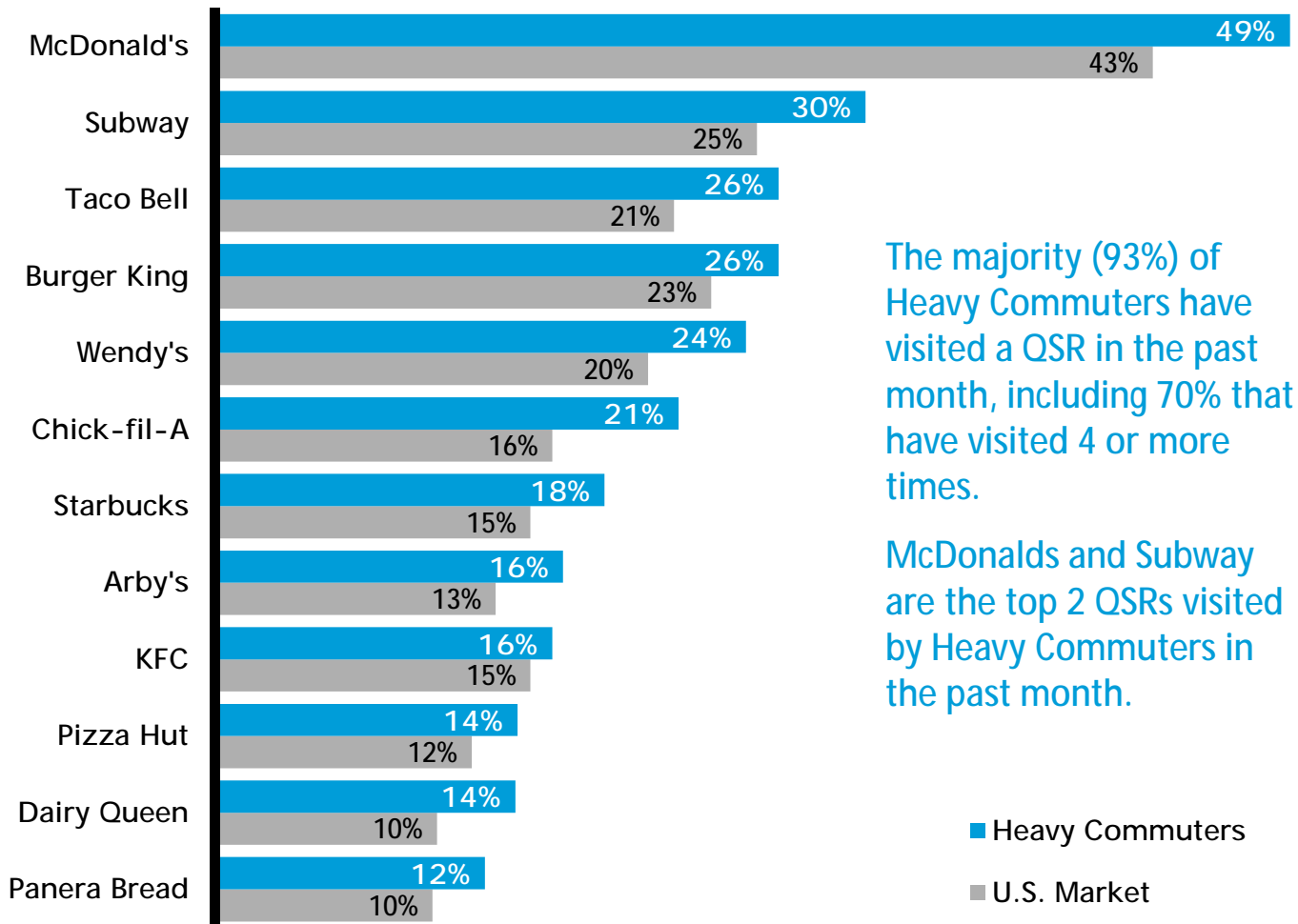
SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

HEAVY COMMUTERS: FAST FOOD RESTAURANT USAGE



OSR Frequency Past Month	U.S. MARKET	HEAVY COMMUTERS
Any QSR	88%	93%
4+ Times	59%	70%
6+ Times	40%	52%
10+ Times	20%	28%

QUICK SERVICE RESTAURANTS USED PAST 30 DAYS



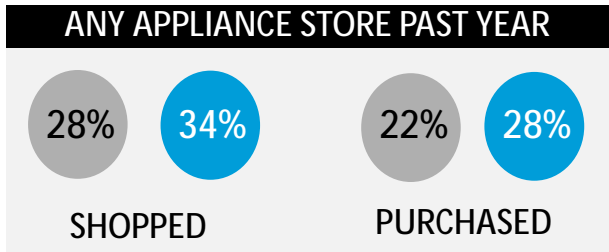
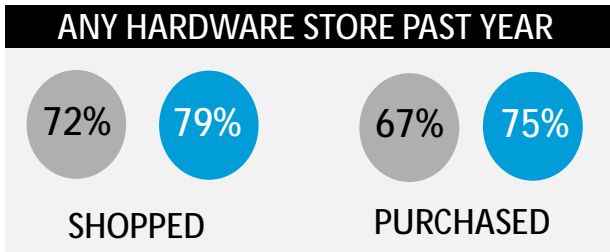
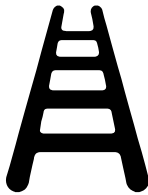
The majority (93%) of Heavy Commuters have visited a QSR in the past month, including 70% that have visited 4 or more times.

McDonalds and Subway are the top 2 QSRs visited by Heavy Commuters in the past month.

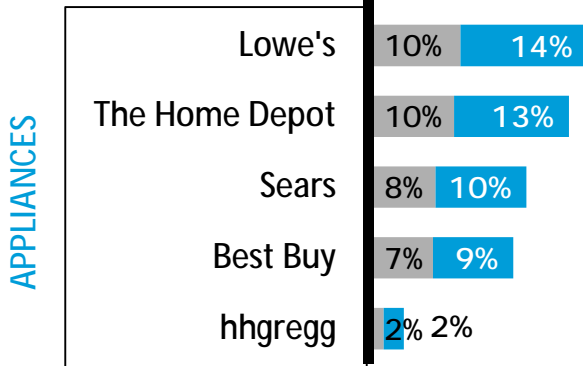
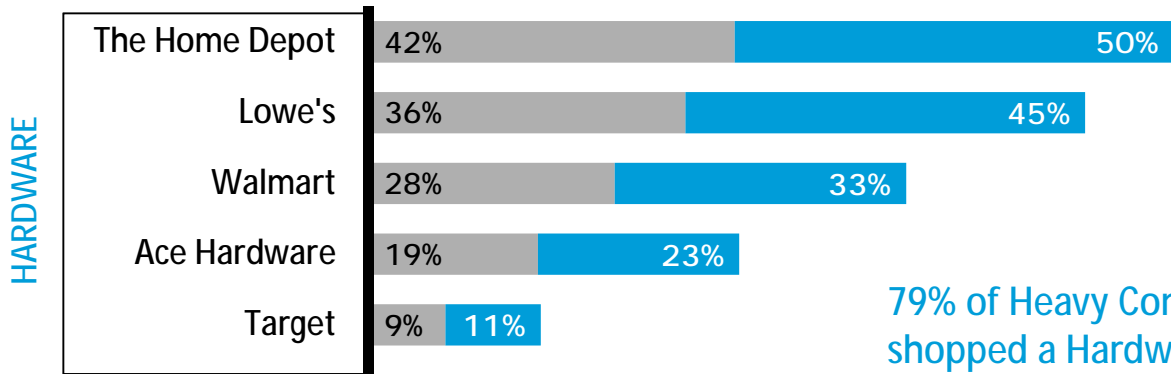
■ Heavy Commuters
■ U.S. Market

SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

HEAVY COMMUTERS: HARDWARE & APPLIANCE STORES



STORES SHOPPED PAST YEAR



79% of Heavy Commuters shopped a Hardware store in the past year, with 75% making a purchase.

The Home Depot and Lowe's are the top hardware stores shopped in the past year by Heavy Commuters.

■ U.S. Market ■ Heavy Commuters

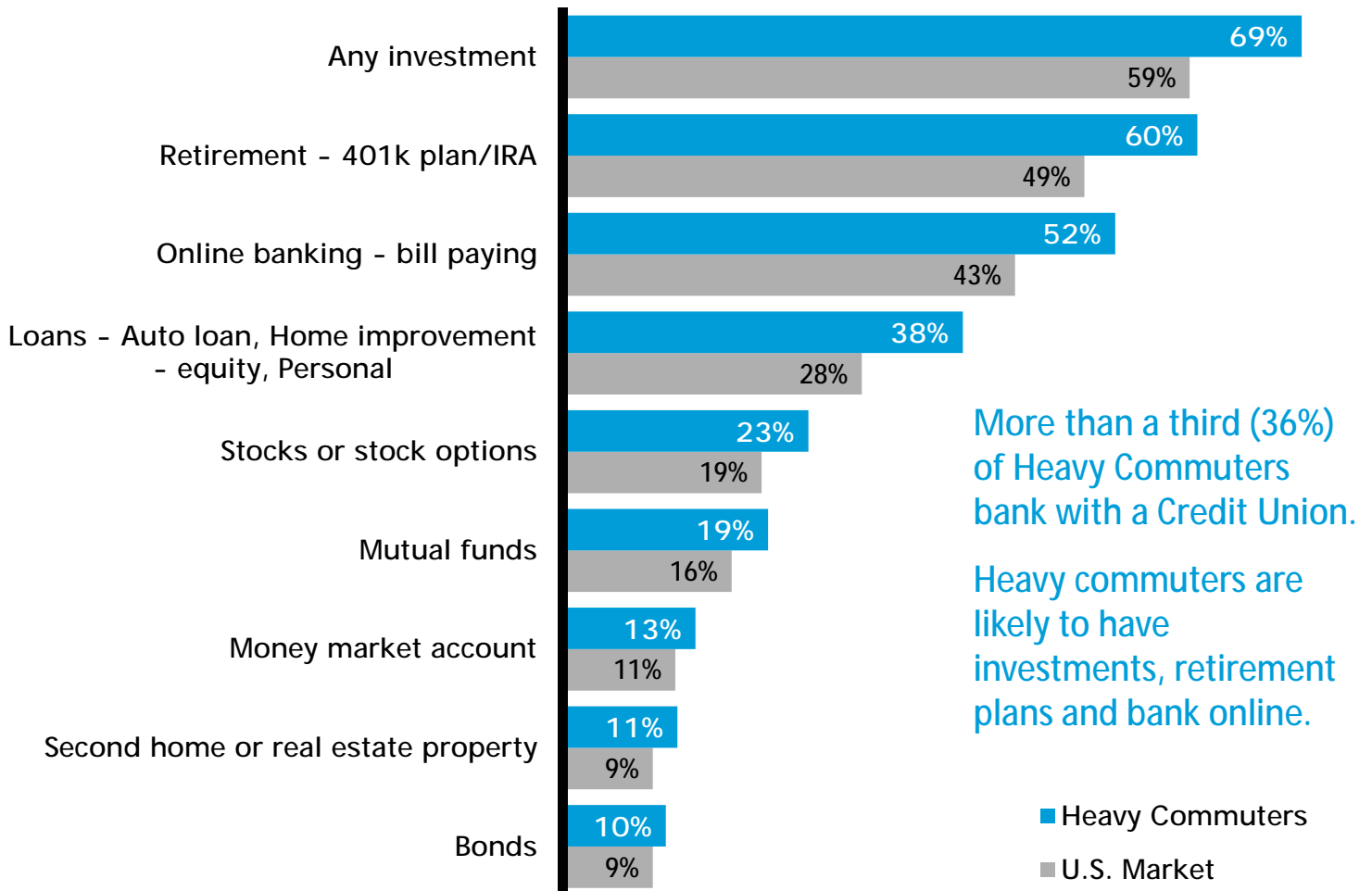
SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016



Banks HHL D Uses	U.S. MARKET	HEAVY COMMUTERS
Any credit union	31%	36%
Wells Fargo	18%	21%
Bank of America	19%	20%
Chase	18%	19%
Citibank	4%	5%
U.S. Bank	5%	5%
PNC Bank	5%	5%

HEAVY COMMUTERS: FINANCIAL SERVICES-INVESTMENTS

FINANCIAL SERVICES-INVESTMENTS HHL D HAS/USES



SOURCE: Nielsen Scarborough, USA+ Market Study, Release 1 2016

ABOUT THE NATIONAL COMMUTER TRACKER

The Nielsen Scarborough National Commuter Tracker is built using a collaborative effort between the client and the Nielsen Scarborough representative. You pick the geography and categories based on your needs and we guide you through which data sets look best for what you are trying to do. Turnaround time is quick, 7-10 days from category selection. Once product is delivered, we will set up a call with you and anyone in your organization to review and answer any questions you may have.

National Commuter Tracker:

- Commuter specific data in a packaged PowerPoint format based on the metro heavy commuter, defined as people who say they have traveled 200+ total miles (via car, van, truck, or bus) in past week
- Customized geography based on your selected trade area
 - Options include full market down to a county level aggregate trade area.
- Standard front-end information includes:
 - Overall market commute information
 - Demographics (HHL D & personal)
 - Activities participated in past 12 months
 - Events attended past 12 months
 - Items HHL D plans to purchase in the next 12 months
- Sales category-specific slides chosen by the client from measured categories within the Nielsen Scarborough database. Choose as many categories as you need based on where you see the opportunity in the market
- Internet, Mobile and Social Networking slides

CATEGORIES AVAILABLE & PRICING

CATEGORIES

<ul style="list-style-type: none"> • Auto • Auto Aftermarket • Banking/Financial /Investment • Beer/Wine/ Liquor (21+) • Casino • Department Stores • Electronics 	<ul style="list-style-type: none"> • Furniture/Appliance • Grocery/C-Store • Health Specialists /Services • Home Improvement /Hardware • Hospitals • Insurance (Auto/ Home/Health/ Life) 	<ul style="list-style-type: none"> • Malls • Professional Services • QSR's • Retail • Sit-Down Restaurants • Sporting Goods • Travel • Wireless
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PRICING

Pricing is based on the number of markets/geographies and the number of sales categories selected.



CONTACT INFORMATION

IF YOU ARE INTERESTED IN GETTING A COPY OF THIS REPORT
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